

Megabus Customer Update

Tips, New Features and Troubleshooting on all the key areas in Marlin® GTX and Marlin HR®

Please find below some useful tips for your business. The team at Megabus is here to help <u>you</u>. Please contact me on the number above if you have any concerns or need assistance with your business systems. We will be sending out regular updates so you can make informed decisions on the key areas in your business.



Customer Maintenance [Part two]

Please find below some of the functions available in Customer Maintenance:

- 1. **Customer Search** Quick search for a customer by their invoice number
- 2. **Normal Sell price** Make sure your customers are set up to default to the correct sell price
- 3. **Bill To feature** You can combine several accounts to have one central statement
- 4. Audit Log Review any maintenance changes to your customer files
- 5. Single Touch payroll Phase #2

1. Customer search

Did you know that you can search by invoice number rather than trying to find the transaction under the customer code?

Select Main | Customers | Manage Customers | and then click on the binocular's icon.



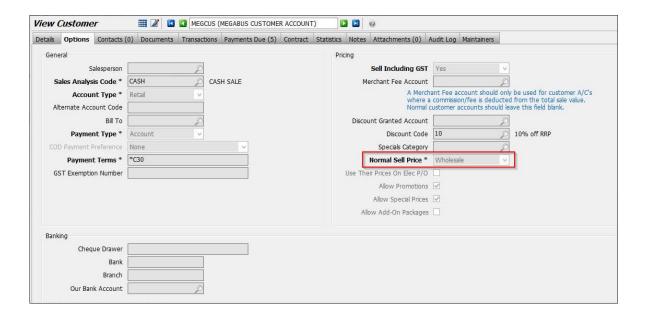
You can then search by a transaction type e.g., Invoice and then type in the reference number.



2. Normal Sell Price

Did you know you can set up each of your customer accounts to default to a sell price (E.g., Retail, Wholesale/Trade etc.)?

- This can be setup in Main | Customers | Manage Customers
- Select the customer account and click on Options
- Choose the Normal sale price from the drop-down list.
- This will be the default price when you are doing a customer work order/invoice.



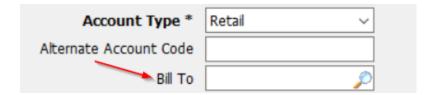
3. Bill To feature

You may have a customer account that has a few separate locations but requires one central statement.

Did you know that you can add each of the locations and then join these to the Head Office account?

You only need to do one payment against the consolidated invoices.

Please let us know if you need any assistance with setting up this feature.

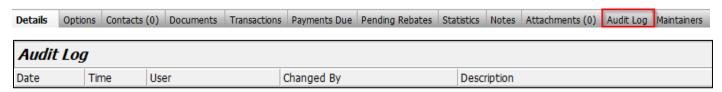


4. Audit Log

Marlin GTX™ records all maintenance changes.

You can find out the time, date, who changed the record and machine (user) with each field that has been changed.

In Manage Customer please click on the Audit Log tab to see any changes to your data.



Update	Weekly Topics
#1	Payment Details and Integrated Eftpos
#2	Monitoring outstanding customer accounts
#3	Using work orders
#4	Business Planner Tips
#5	Customers – Part 1